2003-2004 Desk Reference for

ISIR Analysis Tool for Windows

U.S. Department of Education

FEDERAL STUDENT AID

Table of Contents

Introduction

Preface

This desk reference describes the general procedures for using the ISIR Analysis Tool for Windows software (formerly Quality Analysis Tool for Windows). It is intended to provide basic instructions and is not intended to be comprehensive. For additional information, see the online Help within ISIR Analysis Tool.

ISIR Analysis Tool helps you analyze *initial* and *paid on* ISIR data. These two transactions are displayed side by side for you to see and compare the fields that were corrected. Using EFC ranges and increments of change, you can analyze a specific student population to determine which fields were corrected most often and how those changes affected the students' EFCs.

ISIR Analysis Tool is designed both for schools using EDExpress and for schools using other systems. You must import the ISIR data you will analyze. If you use:

- **EDExpress**, you can import ISIRs directly from your EDExpress database (expres34.mdb)
- **Another system**, you can:
  - Import ISIR data in flat ASCII from your school's system that is formatted according to the ISIR record layout

  Or

  - Import each SARA04OP file you receive from the CPS to both your school's system and EDExpress. Then use EDExpress only to import the ISIRs into ISIR Analysis Tool.

See "Importing and Validating Data" in this desk reference for instructions or see the online Help in the ISIR Analysis Tool software.

How to Download the Software and Documentation

ISIR Analysis Tool for Windows, Version 1.0 is distributed via the Internet. You can download the software and the related user documentation from the U.S. Department of Education's Student Financial Assistance Download (FSAdownload) Web site located at **FSAdownload.ed.gov**.

Instructions for downloading ISIR Analysis Tool for Windows are located in the "Installation Instructions" chapter of the *ISIR Analysis Tool for Windows 2003-2004 Installation Guide*.

If you experience difficulties with the ISIR Analysis Tool software, contact CPS/WAN Technical Support at **800/330-5947** or via e-mail at **cpswan@ncs.com**.

Note: Some organizations restrict their users from downloading from FTP sites. If you have trouble downloading, try again later. If you are still unable to download, contact your technical support staff to ensure you have full FTP download rights.

Setup

Logging In to ISIR Analysis Tool for Windows

To log in to ISIR Analysis Tool for Windows:

1. From the Windows Startup/Programs menu, select **EDESuite**, then **ISIR Analysis Tool for Windows**.
2. If you see the Startup Information dialog box, read the messages displayed there, then click **Close**.
3. Type your user ID and press **Tab** (first time users, your user ID is **SYSADMIN**).
4. Type your password (first time users, your password is **SYSADMIN**).
5. If this is your first login or you want to change your password, type a new password. Then type the password again in the **Verify Password** field.
6. Click **OK**.

System

System Setup allows you to define the settings that ISIR Analysis Tool uses. You must define these settings before you can enter student data.

To define system settings:

1. Select **Tools**, **Setup**, **System** from the menu bar.
2. Type the eight-digit OPE ID.
3. Type the school name.
4. Leave the first check box marked if you use EDExpress. Clear it if you do not use EDExpress. (The default setting is marked.)
5. Mark the **Return to Dialog** check box to return to the dialog box after printing, exporting, or importing. Clear the check box to return to the ISIR Analysis Tool main screen at the end of the process.
6. Click the **down** arrow and select **Multiple** if you usually print multiple records. Select **Single** if you usually print one record at a time. This is the default setting, but you can change it in the Print dialog box for a specific print job at any time.
7. Click the **down** arrow to select **Printer**, **File**, or **Screen** as the default destination for reports.
8. Click **OK** to save the settings.
9. Click **OK** to continue.

Important Note

You can change the Single/Multiple print option or the print destination for a specific print job at any time, but the default setting remains the same until you change it in System Setup.

Verification Edit Profile

Verification edit profiles help you identify students during the Verification Selection process. Each profile is identified by a code, and it uses queries like these to help you flag all student records that meet your verification criteria for the Initial transaction:

- EFC Changed
- Pell Eligible
- Pell Ineligible
- Single Students with Children or Dependents

You can create profiles that contain any combination of non-parameter queries. (A parameter query is a query that prompts you for specific data when you run it.) All non-parameter queries are available in the Verification Edit Profile dialog box. If you do not see a query that you need, you can go to Tools, Query to create it. See the "Queries" section in this desk reference for information on queries.

Select **Process**, **Verification Selection** from the menu bar to use verification edit profiles to set the Initial School Verification flag on the selected records. See the online Help in ISIR Analysis Tool for detailed information on verification edit profiles and the Verification Selection process.

To create a verification edit profile:

1. Select **Tools**, **Setup**, **Verification Edit Profile** from the menu bar.
2. If this is the first format you are creating, skip to step 3. Otherwise, click **Add**.
3. Type a code of up to six characters to identify the profile and press **Tab**.
4. Type a description of up to 50 characters and press **Tab**.
5. In the Select Column, mark the check box next to each query you want to include. To include all queries, click **Select All**. You can select as many queries as you need to identify the target student population. Multiple queries are combined with the logical condition OR. That is, records that meet one or more of the selected criteria are included in the target population.

   To move all selected queries to the top of the list in sequential order while you are selecting fields, click **Resequence**. When you save the profile, close the dialog box, and open the profile again, ISIR Analysis Tool moves the selected queries to the top of the list.
6. Click **OK** to save the profile.

File Management

File Management Setup defines the default folders and paths for your import and export files.

We recommend that you use the default setting C:\IAM\DATA, but you can specify another location. The default folders can be the same for both or different. You can also change the default file names.

To set up File Management for both the Import and Export tabs in the File Management dialog box:

1. Select **Tools**, **Setup**, **File Management** from the menu bar.
2. Click **File Management**.
3. (optional) Click **Default** [**Export or Import**] **Directory**. This dialog box allows you to change the directory (folder) location of your export or import files, if necessary.
4. (optional) Click the **ellipsis (…)** button to the right of the File Path column to locate and select different folders.
5. (optional) Click in the cells in the File Name column to change the location for specific types of export or import files. Use the scroll bars to view the entire list of files.
6. Click **OK** to save the settings.

User Database

User-defined data is data that is not on the ISIR but that your school uses for its own purposes. Examples include freshmen who were awarded aid but who never sent a deposit, or students enrolled in a particular program of study, such as nursing. This tab shows the additional data stored with this record in user-defined fields that you created in User Database setup. If you export your ISIR Analysis Tool data, these fields are included in the export.

You can add user-defined data to multiple student records at one time by importing a user-defined data file or by using Multiple Entry. See “Multiple Entry” and “Importing User-Defined Data” for information.

To print a record’s user-defined fields, select User Database as the report type in the Print dialog box. You can print all of the fields or only the fields you select.

To create fields for your User Database:

1. Select **Tools**, **Setup**, **User Database** from the menu bar. ISIR Analysis Tool warns you to back up your database and close all network copies of ISIR Analysis Tool. When all network copies are closed, click **OK** to continue. The User Database Setup dialog box appears.

2. Begin typing the field name. ISIR Analysis Tool inserts the text in the first empty cell in the Field column. You can create up to 248 fields. Field names must begin with a letter, not a number, and can be 20 characters in length.

3. Click in the adjacent cell in the Type column and click the **down** arrow to select field type (Date, Numeric, Text, or Yes/No).

Field Type	***Description***
Date	Calendar dates
Numeric	Numeric values only—alphabetic characters or blanks are not allowed
Text	Characters, both alphabetic and numeric
Yes/No	True/false values

4. Click in the adjacent cell in the Length column and type the field length. Text fields can have up to 40 characters.

5. Click in the adjacent cell in the Description column and type a description for the field. The description can have up to 50 characters.

6. (optional) Press **Enter** or click **Add** to add another field.

7. Click **OK** to save your changes.

Important Notes

- The field name must begin with a letter, not a number. Yes/No values are automatically set to N for False.

- You can modify user-defined fields if no records in your database contain data for the fields. If a record in the database contains data for a user-defined field, you must delete all of the fields and recreate them to modify them.

User Security

User Security setup is accomplished in two steps. First, determine who will use the software and which functions they will use. Then, create user IDs with the appropriate level of access for each user.

To add a user ID:

1. Select **Tools**, **Setup**, **Security Users** from the menu bar.
2. If this is the first user ID you are adding, skip to step 3. Otherwise, click **Add**.
3. Type the user ID for the ISIR Analysis Tool user in the User ID entry box and press **Tab**.
4. Click the **down** arrow to select the access level for the user and press **Tab**.
5. Type the password for the user in the Password text box. Valid characters for passwords are uppercase letters (A-Z), numbers (0-9), plus sign (+), slash (/), number sign (#), period (.), and apostrophe (').
6. Type the password again in the Verify Password box.
7. Click **Save** to add the user to the database.
8. To add another user, click **Add** and repeat steps 3 through 7.
9. Click **OK** when you are finished adding users.

Important Notes

- You create an initial password for each user, but users can change their passwords each time they log in to ISIR Analysis Tool.
- To change a user ID, delete the user ID and then add the user ID with changes.

Custom Formats

The options under Custom Formats help you select the data items you want to include in reports, including custom reports. These formats extract only the information you want from your data.

Formats are like templates that you can use repeatedly for viewing data and printing reports. You select the fields you want to include in a format and assign a code to identify it. To use the format, you enter its code in the Print dialog box.

You choose the fields for the report only once–when you create the format–and you can create as many custom formats as you need to extract the specific data you need.

Custom Reports

Custom reports are generated using formats that you create in Setup. You use one format for each custom report.

By using formats, you can print the same custom report as many times as you want without having to set up the report each time. You choose the fields for the report only once, when you create the format. You can create as many custom formats as you need to print the specific data you need.

Custom reports allow you to see groups of data specific to your needs that are not available on the reports provided in the software.

To create a custom report format:

1. Select **Tools, Custom Formats, Custom Reports** from the menu bar.
2. If this is the first format you are creating, skip to step 3. Otherwise, click **Add**.
3. Type a code of up to six characters to identify the format and press **Tab**.
4. Type a description of up to 50 characters.
5. In the Select Column, mark the check box next to each field you want to include. To include all fields, click **Select All**.

   To move all selected fields to the top of the list in sequential order while you are selecting fields, click **Resequence**. When you save the format, close the dialog box, and open the format again, ISIR Analysis Tool moves the selected fields to the top of the list.
6. Click **Save** to save the format.
7. To create another format, click **Add** and repeat steps 3 through 6.
8. Click **OK** to return to the ISIR Analysis Tool main screen.

Selected Fields

Use this option to create formats for viewing data on the Transaction Comparison tab and for printing reports that help you identify trends in your population.

If you do not know the trends in your population, a good strategy would be to select all fields, run a report, and see if you can identify trends.

Then you can create more formats that narrow the fields and magnify the trends until you begin to see meaningful data.

To create formats:

1. Select **Tools, Custom Formats, Selected Fields** from the menu bar.
2. If this is the first format you are creating, skip to step 3. Otherwise, click **Add**.
3. Type a code of up to six characters to identify the format and press **Tab**.
4. Type a description of up to 50 characters.
5. In the Select Column, mark the check box next to each field you want to include. To include all fields, click **Select All**.

   To move all selected fields to the top of the list in sequential order while you are selecting fields, click **Resequence**. When you save the format, close the dialog box, and open the format again, ISIR Analysis Tool moves the selected fields to the top of the list.
6. Click **Save** to save the format.
7. To create another format, click **Add** and repeat steps 3 through 6.
8. Click **OK** to return to the ISIR Analysis Tool main screen.

Important Note

The fields are displayed on the Transaction Comparison tab or print on the report in the order in which you selected them when you created the format.

Field Increments

The Field Increments option creates formats for specific EFC fields that determine the number and corresponding percentage of the number of corrections for the selected field, as well as the number of times the EFC increased, decreased, or remained unchanged due to a change in the field.

Generally, when you are preparing to run a report for a field for the first time and you are not sure what you are looking for, create a Field Increment format that has a wide range between the minimum and maximum values and a large increment, so you can get an idea of how your data looks overall.

Then, set up more Field Increment formats that decrease the minimums, maximum, and increments accordingly, so you can pinpoint specific populations with high numbers of corrections for that field.

To create field increment formats:

1. Select **Tools**, **Custom Formats**, **Field Increments** from the menu bar.
2. If this is the first format you are creating, skip to step 3. Otherwise, click **Add**.
3. Type a code of up to six characters to identify the format and press **Tab**.
4. Type a description of up to 50 characters.
5. Click the **down** arrow in the Field box to choose a field from a list.
6. In the Minimum box, type the minimum value for the range and press **Tab**.
7. In the Maximum box, type the maximum value for the range and press **Tab**.
8. In the Increment box, type the increment you want to use.
9. Click **Save** to save the format.
10. To create another format, click **Add** and repeat steps 3 through 9.
11. Click **OK** to return to the ISIR Analysis Tool main screen.

Example

The increment you use should be proportionate to the minimum and maximum values. For example, if the field you are using is Father's Income and you set the minimum at 1, the maximum at 6,000, and the increment at 1,000, the range would be too narrow to capture the majority of your population and the increment too large to capture any meaningful data. If you instead set the minimum at 1, the maximum at 300,000, and the increment at 10,000, then you would capture the majority of your population and identify where the majority of your population falls.

Then, to identify a trend, you could run the report again with an increment of 10,000 using the range that includes the majority of your population (for example, 0 to 100,000). Zero counts as a number, so if you set the minimum value at 0, the maximum value at 100,000, and the increment at 10,000, the ranges returned would be 0 to 9,999, 10,000 to 19,999, etc.

The maximum value you choose might be adjusted upward on some reports to accommodate the increment you choose.

EFC Ranges

The EFC Ranges option creates formats for various EFC ranges that determine differences between the Initial and Paid On values of selected fields, as well as the EFC.

The ranges from the Pell Scheduled Awards Table are included as predefined EFC Range formats under codes EFC01 through EFC40.

Four more predefined codes are also included:

- Initial Pell Ineligible
- All Initial Pell Eligible by Pell Cell
- All Initial Pell Eligible

To create EFC Ranges formats:

1. Select **Tools**, **Custom Formats**, **EFC Ranges** from the menu bar.
2. Click **Add**.
3. Type a code of up to six characters to identify the format and press **Tab**.
4. Type a description of up to 50 characters and press **Tab**.
5. In the Minimum box, type the minimum EFC for the range and press **Tab**.
6. In the Maximum box, type the maximum EFC for the range. The difference between the minimum and maximum must be greater than 99.
7. Click **Save** to save the format.
8. To create another format, click **Add** and repeat steps 3 through 7.
9. Click **OK** to return to the ISIR Analysis Tool main screen.

Important Notes

- Two reports in ISIR Analysis Tool are Pell-based only: the **Changes to ISIR Fields and Pell Eligibility** report and the **ISIR Changes by Field Increment and Pell Eligibility** report. Note that these reports show only changes to the EFC relative to the ranges defined by EFC Range Codes EFC01 through EFC40 (Pell Scheduled Awards Table). The change must move the EFC out of one of these ranges before it is considered an increase or a decrease. On all other reports, any change to the EFC is considered a change. These reports are based on the Initial transaction only.

- The Pell Scheduled Awards Table uses increments of 100. You can make your own EFC Range formats with larger increments so you can see EFC changes on a broader scale, but be aware that you may miss changes that affected awards. You can also make increments smaller than 100, but the difference may not affect aid awards.

Importing and Validating Data

Importing Data

You must use the Import function to enter the data you want to analyze, and you can also import other types of data. The types of data you can import are:

- ***New for 2003-3004!*** **Prior Year User-Defined Queries and Setup.** This import type imports the queries and setup definitions that you used in the prior year's version of the software.
- ***New for 2003-2004!*** **Prior Year User Data.** This import type imports user data from the prior year's database.
- **ISIR Data.** If you do not use 2003-2004 EDExpress for Windows, you can import flat ASCII files in ISIR format.
- **2003-2004 EDExpress Database.** If you use 2003-2004 EDExpress for Windows, you can import ISIR data directly from your EDExpress database. You can construct special queries to use for importing records from your EDExpress database. See "Using Queries to Import Records from EDExpress" in this desk reference for more information.
- **User Defined Data** imports the user data you saved in a separate ASCII file according to the User Data record layout.

Manual Data Entry

The only student data field you can enter manually is the Initial School Verification flag. The Initial School Verification flag can also be entered using the Verification Selection process, which is available on the Process menu. The CPS Verification flag is imported into ISIR Analysis Tool with the ISIR data.

Initial and Paid On Transactions

The *Initial* ISIR transaction is the first valid, non-rejected transaction. The Initial transaction is not necessarily the 01 transaction. The *Paid On* ISIR transaction is the transaction the school deemed to be valid and correct. You must import Initial and Paid On ISIR transactions separately.

- To add Initial data, select **Update "initial" records only** and **Prompt for Duplicates?**.
- To add Paid On data to the records in your database, select **Update "paid on" records only** and **Prompt for Duplicates?**.

When you import Paid On data using the Prompt for Duplicates option, ISIR Analysis Tool alerts you that it has found duplicates and prompts you to Skip, Update, or Discontinue, even though you have not imported Paid On data before and have no Paid On data in your database.

This situation occurs because ISIR Analysis Tool creates not only an Initial transaction record for each student when you import Initial Data, but also a blank Paid On transaction record.

When you then import Paid On data, ISIR Analysis Tool matches the records in its database with the Paid On records you are importing and finds that Paid On records already exist.

Therefore, when ISIR Analysis Tool prompts you to Skip, Update, or Discontinue, choose **Update** or **Update All** to replace the blank Paid On records with your actual Paid On data.

Important Note

You can construct special queries to use for importing records from your EDExpress database. See "Using Queries to Import Records from EDExpress" in this desk reference for more information.

Steps for Importing ISIR Data into ISIR Analysis Tool

To import ISIR data into ISIR Analysis Tool:

1. Select **File**, **Import** from the menu bar.

2. Click the **down** arrow in the Import Type box to select the type of file you want to import: **ISIR Data** or **2003-2004 EDExpress Database**.

   - If you are importing ISIR data in ASCII format, click the **File** button to specify the location of the file.

   - If you are importing ISIR data from EDExpress, click **Selection Criteria** to choose a query to help you narrow the number of records.

3. Choose **Printer**, **File**, or **Screen** as the output destination for the import report. If you choose File, click the **File** button to locate and name the report file.

4. Select **Update “paid on” records only** or **Update “initial” records only**.

5. Mark the **Prompt for Duplicates?** check box if you want ISIR Analysis Tool to prompt you when it encounters records that already exist in the database.

6. When you are prompted during the import process, choose **Skip** to skip the duplicate record, choose **Skip All** to skip all duplicate records, or choose **Discontinue** to stop the import process.

7. Click **OK** to import the file and send the import report to the output destination you selected.

Important Notes

- Remember that if you print to a file, no hard copy prints on your printer.

- To print a hard copy, repeat the print process and select **Printer** as your output destination.

Importing ISIR Data (Non-EDExpress Schools)

The ISIR data you import into ISIR Analysis Tool must be flat ASCII and formatted according to the ISIR record layout. The ISIR record layout is published in the *Electronic Data Exchange (EDE) Technical Reference*, available for download from the U.S. Department of Education's Federal Student Aid (FSA) Web site at **FSAdownload.ed.gov**.

Your ISIR data must also include header and trailer records. The CPS uses header and trailer records to identify the type of data contained in each batch (or file) it receives and sends. Like the CPS, ISIR Analysis Tool expects to find a header record and a trailer record for each batch of student records it imports. Specifications for header and trailer records are available in the *EDE Technical Reference*.

Here's what to do when you contact your computer support staff:

- Ask them if they can create two flat ASCII files from student data stored in your school's system as you need them—one file for Initial transactions and one for Paid On transactions. Each time you receive new ISIR transactions from the CPS, you need ASCII files that you can import into ISIR Analysis Tool, so you have all Initial and Paid On transactions for your students. You must coordinate with your computer support staff on how you will synchronize updates to the data in your school's system and the ASCII files you will import into ISIR Analysis Tool.
- Give them copies of these record layouts from the *EDE Technical Reference*:
    - Header Record Sent To/Received From the CPS
    - Trailer Record Sent To/Received From the CPS
    - ISIR Record Description/Data Dictionary
- Note that the header record must be at the beginning of each file, and the trailer record must be at the end.
- Note that the data should follow the record layouts exactly, in a continuous string of characters with no spaces.

When you receive the ASCII files of ISIRs, you can import them into ISIR Analysis Tool.

Important Note

See the Bits & Bytes section of this desk reference for information on reading record layouts and for an example of what the ASCII file looks like.

Basic Process for Importing Data from Your School's System

Every school's processing environment is unique. As a simple example, however, the steps for importing data from your school's system to ISIR Analysis Tool could be similar to these:

To import data into ISIR Analysis Tool from your school's system:

1. Send a batch of initial applications to the CPS through the SAIG.

2. Retrieve the resulting ISIR batch from your SAIG mailbox.

3. Upload the data into your school's system.

4. Request ASCII files of the data from computer support staff—one for Initial transactions and one for Paid On transactions. The files should include header and trailer records and should be formatted according to the record layouts for

   - Header Record Sent To/Received From the CPS

   - Trailer Record Sent To/Received From the CPS

   - ISIR Record Description/Data Dictionary

   These layouts are located in the *Electronic Data Exchange (EDE) Technical Reference*, available for download from the U.S. Department of Education's Federal Student Aid (FSA) Web site at **FSAdownload.ed.gov**.

5. Receive the ASCII files and import them into ISIR Analysis Tool.

6. Perform analyses in ISIR Analysis Tool.

7. Correct records as necessary in your school's system and send the changes to the CPS.

8. Repeat steps 2 through 7. As you import subsequent ISIR files into ISIR Analysis Tool, you can access all transactions for each student and use them in your analyses.

Importing ISIR Data Using EDExpress (Non-EDExpress Schools)

The ISIR data you import into ISIR Analysis Tool must be flat ASCII and formatted according to the ISIR record layout in the *Electronic Data Exchange (EDE) Technical Reference*, available for download from the U.S. Department of Education's Federal Student Aid (FSA) Web site at **FSAdownload.ed.gov**. If you use a system other than EDExpress to enter and correct student application data, and you have no way to convert your data to the correct format for ISIR Analysis Tool, you can use EDExpress only to import ISIRs into ISIR Analysis Tool.

To import data into ISIR Analysis Tool using EDExpress and your school's system:

1. Send a batch of initial applications to the CPS through the SAIG.

2. Retrieve the resulting ISIR batch from your SAIG mailbox.

3. Before working with the file on your system, copy it to a folder on your PC so you can import it into EDExpress. The default folder for import files in EDExpress is C:\IAM\DATA. SARA04OP.*** is the name of the file.

   This is an important step, because if you're careful to always copy and import the ISIR file you receive from the CPS, all Initial and Paid On transactions for all ISIRs will be available in ISIR Analysis Tool.

4. Import the file into EDExpress. (See the online Help in EDExpress for instructions.) The ISIRs are added to the EDExpress database.

5. Start ISIR Analysis Tool and click **OK** at the first prompt if you need help locating the EDExpress database file.

6. Log in, then go to **Tools**, **Setup** to set up the software if you have not done so already. Now you are ready to import your ISIRs.

7. Follow the steps for importing records in “Steps for Importing Records into ISIR Analysis Tool,” choosing **2003-2004 EDExpress Database** as the Import type. The ISIRs are added to the ISIR Analysis Tool database.

8. Correct records as necessary in your school’s system and send the changes to the CPS.

9. Repeat steps 2 through 8. As you import subsequent ISIR files into ISIR Analysis Tool, you can access all transactions for each student and use them in your analyses.

Important Note

See the Bits & Bytes section of this desk reference for information on reading record layouts and for an example of what the ASCII file looks like.

Importing User-Defined Data

User-defined data is data that is not on the ISIR, but data that your school uses for its own purposes. Examples include freshmen who were awarded aid but who never sent a deposit, or students enrolled in a particular program of study, such as nursing. When you are updating user-defined fields for multiple students, you may want to import the changes instead of entering them one student at a time on the User Database tab.

To update user data in ISIR Analysis Tool for multiple students, you import a user data file that you create. This file must be a flat ASCII file formatted according to the User Data record layout, which you can print from ISIR Analysis Tool. Select **File**, **Print** and choose **Record Layout – Import User Data**. See “Creating a User-Defined Data File to Import” for instructions.

You can also use Multiple Entry to add user-defined data to multiple student records.

To import user-defined data into ISIR Analysis Tool:

1. Select **File**, **Import** from the menu bar.
2. Click the **down** arrow in the Import Type box and select **User Defined Data** as the import type.
3. Choose **Printer**, **File**, or **Screen** as the output destination for the import report. If you choose File, click the **File** button to locate and name the report file.
4. Click **OK** to import the file and send the import report to the output destination you selected.

Creating a User-Defined Data File to Import

Here are the steps for creating a user data file according to the Import User Data record layout. You can print the layout in ISIR Analysis Tool by selecting **File**, **Print** and choosing **Record Layout – Import User Data** for the report type.

Use a DOS text editor (such as Microsoft Notepad) or a word processing program. Type one record per line. Do not use hyphens or empty lines, and use spaces only as placeholders for positions you do not fill with data. Do not press Enter after the last record, because doing so inserts a blank line and causes an error in ISIR Analysis Tool.

To create a user-defined data file to import:

1. Type the nine-digit SSN of the first record.
2. Type a sequence number of up to five characters. If the sequence number contains fewer than five characters, use spaces for the remaining characters.
3. Type the name of the field, using up to 20 characters. If the field name contains fewer than 20 characters, use spaces for the remaining characters.
4. Type the value for the field, using up to 40 characters. If the value contains fewer than 40 characters, use spaces for the remaining characters.
5. Press **Enter**.
6. Type the SSN for the next record and repeat steps 2 through 5 until you have entered all records.
7. (optional) Type an end of file (EOF) marker.
8. Name and save the file.

Important Note

Microsoft Notepad and other DOS text editors save files only in ASCII, so they are convenient to use in creating this file. You can use a word processing program to create the file, but you must specify an ASCII file type when you save the file. Refer to the documentation for the word processing program to determine the correct file type for ASCII text.

Importing Prior Year Data

You can import two types of prior year data into ISIR Analysis Tool. If the prior year's data has not changed, importing it saves you time, because you do not have to re-enter it.

To import prior year data into ISIR Analysis Tool:

1. Select **File**, **Import** from the menu bar.
2. Click the **down** arrow in the Import Type box to select the type of prior year data you want to import: **Prior Year User-Defined Queries and Setup** or **Prior Year User Data**.
3. Choose **Printer**, **File**, or **Screen** as the output destination for the import report. If you choose File, click the **File** button to locate and name the report file.
4. If you are importing prior year user data, click **Select User Data Fields** to choose the prior year user data fields you want to import.
5. Click **OK** to import the data and send the import report to the output destination you selected.

Prior Year User-Defined Queries and Setup

This import type imports the queries and setup definitions that you used in the prior year's version of the software.

User-defined queries are moved unless the query:

- Contains a user-defined field from the prior year's user database that you have not moved to or created in this year's database. If you select the User Database option and select a query group, ISIR Analysis Tool moves the User Data fields before moving the query group.
- Contains a field that was modified or removed.
- Contains a specific date as a parameter.

- Has the same name as a query in this year's database.
- Has a title that contains only invalid characters. If a query title contains an invalid character, ISIR Analysis Tool replaces it with a space.

Setup definitions are moved unless the setup record:

- Has the same code or identifier as a record in this year's database.

Prior Year User Data

This import type imports user data from your current database to your new database in this software version. Records are moved according to the criteria you specify using the Selection Criteria function.

In the Import dialog box, when you select Prior Year User Data and click OK, a second dialog box with a grid is displayed so you can choose the specific user data records you want to import.

If a record that ISIR Analysis Tool is importing has the same SSN as a record already in the new database, it does not import the record. Any records that could not be moved are listed on the Import Edit Report when the import is complete. To avoid encountering duplicate records, import prior year user data **before** importing ISIRs.

Multiple Entry

Using Multiple Entry, you can update the Initial School Verification Flag and enter data for user-defined fields (that you created in User Database setup) for multiple student records at one time. This saves you the effort of opening and updating each individual record.

New for 2003-2004! You can use Multiple Entry to update the Initial School Verification Flag to blank for groups of students.

You can select the group of students using a query, by entering a list of SSNs, or by using a file of SSNs.

To update multiple records:

1. Select **Process, Multiple Entry** from the menu bar.

2. Mark the check box in the Select column for the field you want to update. Then click in the Value column for the field and enter the value. Repeat this step for each field you want to update.

3. (optional) Click on **SSN File** to choose an SSN file from your database. For information on creating an SSN file, see "Creating an SSN File" in this desk reference.

4. (optional) Click on **Selection Criteria** to select records by using a query.

5. Select **Printer**, **File**, or **Screen** as the output destination. If you choose File, click the **File** button to locate and name the file, then click **OK**. ISIR Analysis Tool enters the filename in the text box.

6. Click **OK**. A second window appears that has all records that you selected and the fields to be updated displayed in a scrollable spreadsheet. The fields to be updated are displayed in the rightmost columns and can be modified on a record-by-record basis.

7. Click **Save** and then confirm **Yes** twice to perform updates and initiate the save process. ISIR Analysis Tool generates an edit report that identifies which updates were not made, which student records were affected, and why the update was not made.

Important Notes

- You must run the Data Validation process before using Multiple Entry.
- To save time, you can use Multiple Entry to update the Initial School Verification Flag to blank on groups of records instead of individual records.

Using an SSN File in Multiple Entry

As an example of updating a group of records using an SSN file, let's say you want to be able to identify all the students enrolled in the Nursing program. The ISIR does not contain a field that helps you identify these students, so you need to create a user-defined field. You have a long, handwritten list of their SSNs that would be easier to use in an electronic file, not only for ISIR Analysis Tool, but also for other tasks in your office.

To add the information using Multiple Entry:

1. Create a list of the SSNs in ASCII format. (See "Creating an SSN File" for instructions.)
2. Create a user-defined field called "Program". (See "User Database" for instructions.)
3. Select **Process**, **Multiple Entry**.
4. Mark the check box in the Select column next to the Program field.
5. Type "nursing" in the Value column next to the Program field.
6. Click the **File** button under SSN File and locate the SSN file you created.
7. Click **OK**. The Program field, containing the value "NURSING", has been added to all of the records listed in your SSN file.

Creating an SSN File

If you want to update a group of student records using Multiple Entry, an SSN file is a convenient way to select the records. The file must be in ASCII text.

To create an SSN file:

1. Type the nine-digit SSNs using a DOS text editor (such as the Windows Notepad) or a word processing program. Type one SSN per line. Do not use hyphens, spaces, or empty lines. Do not press Enter after the last SSN, because doing so inserts a blank line and causes an error in ISIR Analysis Tool.

2. (optional) Type an end of file (EOF) marker.

3. Name and save the file.

Important Note

Microsoft Notepad and other DOS text editors save files only in ASCII, so they are convenient to use in creating this file. You can use a word processing program to create the file, but you must specify an ASCII file type when you save the file. Refer to the documentation for the word processing program to determine the correct file type for ASCII text.

Validating Data

Data Validation is a process that alerts you of unmatched records (records with a blank EFC for the Initial or Paid On transaction) in your database. ISIR Analysis Tool prompts you to continue with the process or cancel it. If you select Yes to continue, the unmatched records are deleted. At the end of the process, you can print a list of the deleted records.

When you locate the missing transactions for the deleted records, you can import them and then run Data Validation again.

The Data Validation process also calculates and stores data on scheduled Pell awards, which is used in some reports.

Assumptions

When calculating, ISIR Analysis Tool makes these assumptions:

- The student’s enrollment status is full time.
- The Pell budget is more than $3,850.
- The student is Pell-eligible if the EFC is within a Pell range.

Running the Process

Click **Process**, **Data Validation** to start the Data Validation process.

Run the Data Validation process after you import data and before you analyze the data.

You must run the process before you can print these reports:

- Changes to ISIR Fields and Pell Eligibility
- Custom Report
- Changes to ISIR Fields
- ISIR Changes by Field Increment

- ISIR Changes by Field Increment and Pell Eligibility
- List—EFC Change by Student
- List—Verification Flags by Student
- List—Verification Selection Criteria by Student
- Transaction Comparison
- User Database

Important Note

You can run the Data Validation process at any time when a student record is not open.

Analyzing Data

Transaction Comparison

The Transaction Comparison tab shows the student's demographic data, as well as a side-by-side comparison of Initial and Paid On transactions.

You can choose to see all fields, or you can choose a specific group of fields using Selected Fields Codes that you define in **Setup**, **Custom Formats**, **Selected Fields**.

If you did not choose a Selected Fields Code when you opened the record, all fields are displayed.

This table explains the notations in the Change column:

This symbol or notation	Indicates
Blue shading	A change between the Initial and Paid On values in that row
0 (zero)	No change between Initial and Paid On dollar values
- (minus symbol) next to difference in value	The dollar value for the field on Initial ISIR transaction is greater than the value for the field on the Paid On transaction
Y	A change between Initial and Paid On in this numeric or alpha-numeric field
N	No change between Initial and Paid On in this numeric or alpha-numeric field

Other Options

Reset School Verification Flags

If you set School Verification Flags on some or all student records, you can use this option to reset the flags for all records in the database.

Remove Verification Edit Profile Flags

If you flagged records with verification edit profiles, you can use this option to remove the flags from all records in the database.

Reports

The reports you can generate in ISIR Analysis Tool help you examine subsets of your sample and analyze your student population.

You can select a report to print to a **printer**, print to a **file** to save the report, or print to the **screen** to view it.

These reports are available:

- **Changes to ISIR Fields.** This report lists fields that affect the EFC and displays the number of corrections made to those fields with a corresponding percentage of the total number of corrections. It also shows the number of records for which the EFC increased, decreased, or remained unchanged as a result of a change to any of the selected fields, as well as the corresponding percentages for each changed field.
- **Changes to ISIR Fields and Pell Eligibility.** This report prints the corrected records in an initial EFC range for a selected sample.
- **Custom Report.** Custom reports are reports that you design for your needs, using fields that you select.
- **ISIR Changes by Field Increment.** This report shows the number of corrections made to the selected field for a specific increment and the corresponding percentage of the number of corrections for that field. It also shows the number of times the EFC increased, decreased, or remained unchanged due to a change to the field, as well as the corresponding percentages for the field.
- **ISIR Changes by Field Increment and Pell Eligibility.** This report shows counts and percentages for Pell eligible corrected records. It also shows the scheduled Pell award data that was calculated and stored during the data validation process.
- **List—EFC Change by Student.** This report shows differences between the Initial value and the Paid On value of the field selected for a sample of students. It also shows the Initial and Paid On EFC values and the difference between them.

- **List—Verification Flags by Student.** This report shows the values for CPS verification flags (Initial and Paid On) and school verification flags (Initial and Paid On) for a selected list of students. These values show students who became Pell eligible and ineligible and students whose EFC changed and whose EFC remained unchanged. Verification Tracking Flag values are included on the report.

  New for 2003-2004! You can select the Totals Only? option to print only the summary section for this report.

- **List—Verification Selection Criteria by Student.** This report shows a list of students to whom verification edit profiles apply, along with the codes and descriptions of those profiles. More than one profile can apply to a student.

- **List—Verification Selection Criteria by Code.** This report shows a list of verification edit profiles and each student to whom the profiles apply. More than one profile can apply to a student.

- **Query Management.** The Query Management report is a list of both the queries you have created and the predefined queries provided with the ISIR Analysis Tool software.

- **Record Layout—Export Full.** This option prints a record layout for full data export.

- **Record Layout—Export UD.** This option prints a record layout for the User Database.

- **Record Layout—Import User Data.** This option prints a record layout for user-defined data files that you import. It provides specifications for field length, field description, start position, and end position.

- **System Setup.** You can print the System setup information including System and File Management information.

- **Transaction Comparison.** This report shows the demographic data and transaction comparison data for a student or a group of students.

- **User Database.** This report provides the field names and values entered in the user database for each student, listed by SSN.

- **Verification Edit Profile Setup.** This report provides verification edit profile setup information. You can print one or all of the verification edit profiles at a time. To print all profiles, leave the Verification Edit Profile Code field blank in the Print dialog box.

Important Notes

- To begin your analysis, first print the Changes to ISIR Fields Report using the ALL Selected Fields Code. ALL is a predefined code that is shipped with the software. It selects all ISIR fields so you can see which fields have the most changes overall. With that information, you can then focus your analysis on those fields and identify the trends in your population.

- Step-by-step instructions for building queries can be found in the Bits & Bytes section of this desk reference.

- You can create queries to use with all reports except Record Layouts.

Printing a Report

To print a report:

1. Select **File**, **Print** from the menu bar.
2. Click the **down** arrow in the Report box and click on the type of report you want to print.
3. Click **Multiple**.
4. Click **Printer**, **File**, or **Screen** as the output destination.
5. Click the **Selection Criteria** button to select specific records or to use a query. Query allows you to narrow the number of records you want to work with. This option is especially helpful with large databases, as it decreases your processing time.
6. Specify information for the report, such as dependency status or sort order. Type any format codes that ISIR Analysis Tool prompts you to enter or click the **ellipsis (...)** button to select a code from a list.
7. Click **OK** to print.

If you chose **Screen** as your output destination, use the **scroll bars** to view the report. You can also print the report on your printer after you viewed it on the screen. Click **Close** when you are finished.

Printing a Custom Report

To print a custom report:

1. Select **File**, **Print** from the menu bar.
2. Click the **down** arrow in the Report box to display a list of reports and choose **Custom Report**.
3. Choose where you want to send the report: **Printer**, **File**, or **Screen**.
4. Type the format code you want to use in the Custom Report Format field, or click the **ellipsis (…)** button to choose a code from a list.
5. Type an SSN in the Enter SSN box, or click the **ellipsis (...)** button to choose an SSN from the database.

6. (optional) Click the **Selection Criteria** button to use a query.

7. Click **OK** to print.

Important Note

When you want to print a report that contains data from specific fields (a custom report), you can use a query to compile the data. To use a query, click the **Selection Criteria** button in the Print dialog box.

Export

Export is used to export all student records from the ISIR Analysis Tool database to a file. The export includes both Initial and Paid On data. You can run the Full Data Export at any time.

If you intend to use the data you export in another system, consider:

- Will the system accept flat ASCII files?
- The exported file contains all transactions for all students in the database, as well as user-defined data.
- The exported file is formatted according to the Export Full record layout, which you can print in ISIR Analysis Tool. Select **File**, **Print** and then choose **Record Layout – Export Full** for the report type.

At the end of the export process, the In Progress dialog box displays a summary of the number of records processed in the batch and the export filename.

Important Note

The number of user-defined fields is limited to the maximum length of the export file.

Bits and Bytes

Queries

A query is a set of criteria that describes a particular student population. Queries are used in functions such as Print to select specific groups of student records from all the records in the database. Some queries have fixed values, or you can enter different values each time you use the query.

Queries can be used to limit the number of students selected when you are generating a report, or they can target information about a select group of students.

ISIR Analysis Tool comes with a set of commonly used predefined queries. Wherever the Selection Criteria option is available in ISIR Analysis Tool, you can use these queries to identify groups of records. You can also use predefined queries as templates to create your own queries.

When you open Query for the first time, you will see that the predefined queries are stored as the first set of records in the Query database. You will know that a query is predefined when you see "PREDEFINED QUERY" in the upper right corner of the Query box.

Important Notes

- Use the Query function to create queries that are most useful for you in the way that you collect and analyze data for ISIR Analysis Tool.
- You cannot delete predefined queries.

Rules for Queries

Some basic rules apply to constructing queries in ISIR Analysis Tool:

- Queries are processed from left to right, or beginning to end; however, **AND** is applied first, even if it appears after **OR** in the query statement.
- **Parentheses** change the order of precedence. Expressions enclosed in parentheses are processed before AND and OR.
- In the case of nested expressions, innermost parentheses are processed first. See the topic "Using Parentheses" in online Help for more information.
- Both segments of the query connected by **AND** must be true for a field value to be selected.
- Only one of the segments connected by **OR** must be true for a field value to be selected.

Sample Queries

Sample 1

This query finds all records with the CPS Verification Flag set to Yes.

(SELECTED FOR VERIFICATION = "Y")

Sample 2

This query is a parameter query. It prompts you to enter the dependency status, D (Dependent) or I (Independent), at the time you run the query. The query finds only the records with the dependency status you specify.

(DEPENDENCY STATUS = "[PARAMETER]")

Sample 3

This query finds all records with Parent's Adjusted Gross Income of less than $50,000 and prompts you to enter the value for Student's Adjusted Gross Income at the time you run the query. The query finds only the records that meet both criteria.

(PARENT'S ADJUSTED GROSS INCOME < 50000) AND (STD'S ADJUSTED GROSS INCOME < [PARAMETER])

Field to Field Queries

The Field to Field option helps you build a query that compares numeric fields within one record. For example, if a student has two ISIR transactions, a field to field query compares the numeric fields in the 01 transaction only with the other numeric fields in the 01, not with the numeric fields in the 02. This option is not available if you marked Prompt at Execution or Current Date.

Examples of Field to Field Queries

As an example of how to use this function, you can query on taxes paid as a percentage of AGI. The statement would look something like this:

> PARENTS' U.S. INCOME TAX > PARENTS' ADJUSTED GROSS INCOME * .10 (or other decimal for the percentage you choose)

More examples:

> Father's Income > Parents' Adjusted Gross Income
>
> Mother's Income > Parents' Adjusted Gross Income
>
> Student's Income > Student's Adjusted Gross Income
>
> Student's U.S. income Tax Paid > Student's Adjusted Gross Income * 0.22 (or other percentage you choose)
>
> Worksheet A > Student's Adjusted Gross Income * 0.07 (or other percentage you choose)
>
> Worksheet B > Student's Adjusted Gross Income * 0.11 (or other percentage you choose)
>
> Worksheet C > Student's Adjusted Gross Income

Creating a Query

To create a query statement, select a field from the Field list (you can type the first letter of a field to see the field names that begin with that letter) and then select an operator and a value to narrow the range of values for the field you have selected.

- To see the valid values for the field you chose, click the **Value Help** button.
- To connect two or more statements, click the **And** or **Or** button and then create another statement using the Field, Operator, and Value fields. Your query appears in the Criteria box.

To create a query:

1. Select **Tools**, **Query** from the ISIR Analysis Tool menu bar.
2. If you are creating a query to import records from EDExpress, click the **EDExpress** tab.
3. Click the **Add** button.
4. Type a descriptive title for the query.
5. Select a field from the Field list. You can type the first few letters of the field name to find the field names that begin with those letters. User-defined data fields appear at the top of the list.
6. Select an operator.
7. Type a value for the field. Click the **Value Help** button to see the valid values for the field.

   If you want to be prompted for a value at the time you use the query, do not specify a value for the query statement. Instead, mark the **Prompt at Execution** check box. For date fields, if you want the software to use the current date when you use the query, mark the **Current Date** check box and leave the Value field blank.

8. Click the **Append** button to add the query statement to the Criteria box.

9. (optional) Click the **And** button or the **Or** button to add another statement to the query. Repeat steps 5-9 until you have added all statements for the query, then continue with step 10.

10. Click **Save** to save the query.

11. Click **OK** to close the Query dialog box or click **Add** to create another query.

Important Notes

- To create a query for Initial or Paid On data, select **Transaction** for the field, **LIKE** for the Operator, and **IN** (Initial) or **PD** (Paid On) for the value. The default is to return records that meet criteria for *either* transaction.

- To create a query to import records from EDExpress for Windows, select **Tools**, **Query** from the menu bar, then click the **EDExpress** tab.

Creating a Query from a Predefined Query

To create a query from a predefined query:

1. Select **Tools**, **Query** from the ISIR Analysis Tool menu bar.

2. Click **Retrieve** in the database buttons box to select a predefined query to use for a template.

3. Type a new title for the query. You can modify and save a predefined query only if you rename it.

4. Modify the query. Click any line to select it and change the Field, Operator, or Value. Then click the **Change** button.

   You can also delete lines or add new lines to the query. To add new lines, select the line that should appear after the new line. Specify the Field, Operator, and Value for the new line, then click **Append**. Use the other buttons located around the Criteria box to fine-tune the query statement if necessary.

5. Click **Save** to save the query.

6. Click **OK** to close the Query dialog box or click **Add** to create another query.

Using a Query

To use a query:

1. Click the **Selection Criteria** button.

2. Click the **ellipsis (…)** button next to the Query Title field to display a list of queries. The Query Grid dialog box appears.

3. Click on the query you want to use to select it.

   If the Parameter Query column **is not** marked, click **OK**. ISIR Analysis Tool returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. To further narrow your selection, click the **Select Records** button. When finished, skip to step 8.

   If the Parameter Query column **is** marked, click **OK**. ISIR Analysis Tool returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. Click **OK** or, to narrow your selection, click the **Select Records** button. The Parameter Query Entry dialog box appears. Continue to step 4.

4. Click in the Field Value column next to each Field Name and type a valid value. Click the **Value Help** button to see a list of valid values.

   If you leave a value blank, ISIR Analysis Tool automatically enters NULL as the value. When you run the query, records that contain NULL for that field value are returned. See "Null Values" for more information.

5. Click the **View Query** button to see the completed query. Review the query carefully to be sure you have entered the correct values for each field.

6. Click **Close** to return to the Parameter Query Entry dialog box.

7. Click **OK**. If you clicked the Select Records button, the Select Records grid appears. Mark the check boxes in the Selected column to choose the records and then click **OK**.

8. Click **OK** to run the query. A box displays the progress of the process.

9. Click **OK** to clear the In Process box.

Null Values

When you click **OK** in the Parameter Query Entry dialog box, ISIR Analysis Tool automatically enters NULL for any values you have left blank and displays a warning.

- When you click **OK** to clear the warning, the Parameter Query Entry dialog box displays again so you can enter a value.
- If you leave the value blank, ISIR Analysis Tool enters NULL as the value.

When you run the query, records containing NULL for that field value are returned.

Using Queries to Import Records from EDExpress

Your EDExpress database may be very large, so you can construct special queries to use for importing records from EDExpress into ISIR Analysis Tool.

These queries help you limit the number of records quickly and easily.

The fields for the queries are derived from the demographic record in EDExpress and are available only for this import, not for other ISIR Analysis Tool functions:

ADD DATE	LAST NAME
ADD TIME	ORIGINAL SSN
ADD USERID	UPDATE DATE
CURRENT SSN	UPDATE TIME
FIRST NAME	UPDATE USERID

To create one of these special import queries, click the **EDExpress** tab in the Query dialog box and follow the same steps as you would for creating other queries. Then, to import the records, follow the steps for importing.

Modifying a Query

To modify a query:

1. Select **Tools**, **Query** from the ISIR Analysis Tool menu bar.

2. Click **Retrieve** in the database buttons box to select the query you want to modify.

3. Modify the query. Click any line to select it and change the Field, Operator, or Value. Then click the **Change** button.

   You can also delete lines or add new lines to the query. To add new lines, select the line that should appear before the new line. Specify the Field, Operator, and Value for the new line, then click Append. Use the other buttons located around the Criteria box to fine-tune the query statement if necessary.

   To delete a line, select the line and click **Remove**.

4. Click **Save** to save the query.

5. Click **OK** to close the Query dialog box or click **Add** to create another query.

Deleting a Query

To delete a query:

1. Select **Tools**, **Query** from the ISIR Analysis Tool menu bar.

2. Click **Retrieve** in the database buttons box to select the query you want to delete. You cannot delete predefined queries.

3. Click the **Delete** button in the database buttons box. ISIR Analysis Tool asks you to confirm that you want to delete the query.

4. Click **Yes** to delete the query.

5. Click **OK** to continue.

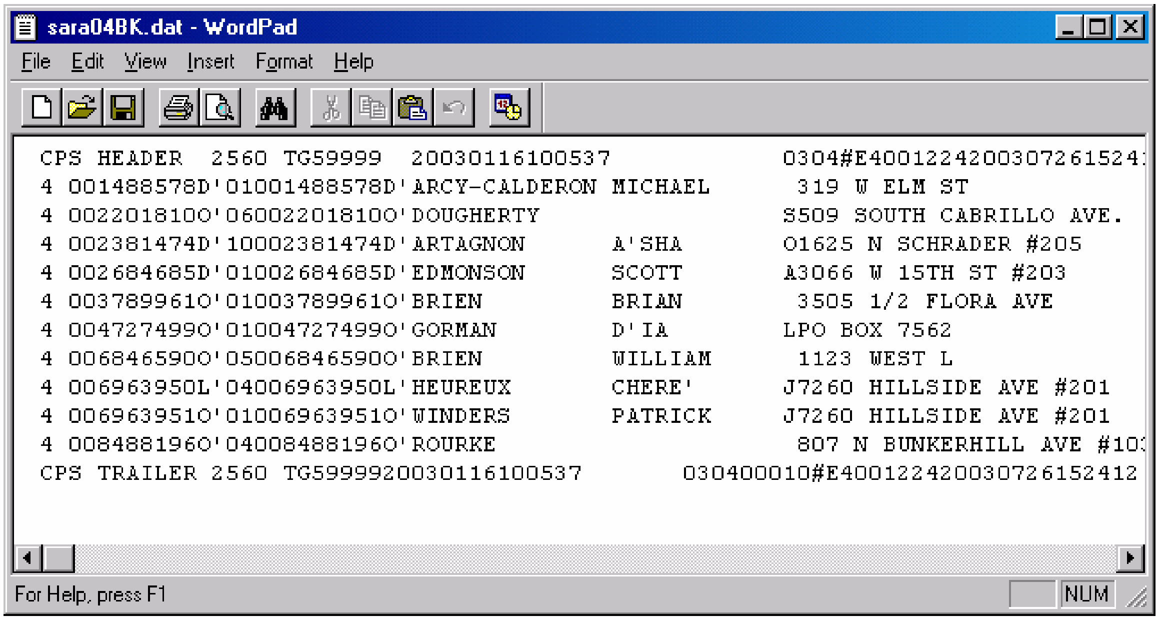
Reading Record Layouts

The columns in the record layouts in the *EDE Technical Reference* are in the order in which the data for each record should appear.

Field #	Number of the field in the record.
SAR Field	Number of the SAR field to which this field corresponds. ISIR only; not in header or trailer record.
Start	First position of the field.
End	Last position of the field.
Length	Sum of the positions assigned to a field.
Changes	Describes how the field changed from the previous cycle's ISIR to the current cycle.
Field Name	General term that identifies the field.
Valid Content	Predefined content that satisfies processing requirements to be used in the field. A "blank" listed as a valid value also indicates that the data element is not a required field. Elements other than those described are rejected by the software.
Justify (Signed)	Justification that should be used. "(Signed)" applies only to ISIR fields and refers to the alignment of signed (positive or negative) numbers.

Example of an ASCII File to Import

The screenshot below shows a portion of what the ASCII file you intend to import should look like.




```
CPS HEADER  2560 TG59999  20030116100537            0304#E4001224200307261524:
4 001488578D'01001488578D'ARCY-CALDERON MICHAEL      319 W ELM ST
4 0022018100'060022018100'DOUGHERTY                 S509 SOUTH CABRILLO AVE.
4 002381474D'10002381474D'ARTAGNON      A'SHA       O1625 N SCHRADER #205
4 002684685D'01002684685D'EDMONSON      SCOTT       A3066 W 15TH ST #203
4 0037899610'010037899610'BRIEN         BRIAN        3505 1/2 FLORA AVE
4 0047274990'010047274990'GORMAN        D'IA        LPO BOX 7562
4 0068465900'050068465900'BRIEN         WILLIAM      1123 WEST L
4 006963950L'04006963950L'HEUREUX       CHERE'      J7260 HILLSIDE AVE #201
4 0069639510'010069639510'WINDERS       PATRICK     J7260 HILLSIDE AVE #201
4 0084881960'040084881960'ROURKE                     807 N BUNKERHILL AVE #10:
CPS TRAILER 2560 TG5999920030116100537       030400010#E4001224200307261524l2
```

Notice that:

- The file contains one entire student record per line. The data for each record is entered in one continuous string of characters with no line breaks until the end of the record. You can see a long horizontal scrollbar in the screenshot, which tells you that the lines, the student records, extend far past the right-hand border of the window.
- The spaces you see—for example, between "O'Brien" and "William"—are placeholders for the positions not filled with data. "O'Brien", the student's last name, contains 7 characters, but the Last Name field on the ISIR is 50 characters long. Therefore, the field's remaining 43 characters are filled with spaces.
- The first line of the file is the header record, and the last line is the trailer record.
- You'll see other examples if you open a SARA04OP file that you receive from the CPS. The ISIR files you create should resemble CPS-generated ISIR files.

Getting Help

Online Help

Instead of a paper user's guide, ISIR Analysis Tool has online Help. General help is available from the menu bar, and field help is available by pressing the F1 key. See the topic "Using Help" in the online Help for more information.

CPS/WAN Technical Support

For questions regarding technical assistance and software functionality, call CPS/WAN Technical Support at:

800/330-5947

TDD/TYY: 800/511-5806

or e-mail CPS/WAN Technical Support at:

cpswan@ncs.com

Sources of Assistance for Schools

See *Sources of Assistance for Schools* for contact information for Performance and Accountability Improvement, the QA Program listserv, and the QA Program Web site. This document contains helpful contact information for all Federal Student Aid programs, including frequently called help lines, e-mail addresses, phone numbers, and Web site addresses.

You can download the software and the related user documentation from the U.S. Department of Education's Federal Student Aid (FSA) Web site located at **FSAdownload.ed.gov**.

QA Team Help

If you would like to contact the Performance and Accountability team for help, send an e-mail to:

qualityassurance@ed.gov

ISIR Analysis Tool Updates

Downloading ISIR Analysis Tool Updates

You can download the software and the related user documentation from the U.S. Department of Education's Federal Student Aid (FSA) Web site located at **FSAdownload.ed.gov**. This Web site was created to give you access to financial aid tools (for example, software and paper documents) for easier and more efficient use of ISIR Analysis Tool.

Paper documentation is available to download from the Internet in Adobe PDF format. The following types of paper documentation are available to download:

- Installation Guides
- Cover Letters
- Technical References
- Desk References

The amount of time it takes to download a file depends on the file size and the speed of your Internet connection. If you do not have a direct connection to the Internet, a 56 KB modem is recommended.